



Filing ID #10027050

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Greg Walden  
**Status:** Member  
**State/District:** OR02

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2018  
**Filing Date:** 05/15/2019

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cascade Central Credit Union money market [BA]	JT	\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Columbia Gorge Broadcasters [RP]	JT	\$250,001 - \$500,000	None		<input type="checkbox"/>
LOCATION: Hood River, OR, US					
Columbia State Bank-various accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Congressional Federal Credit Union - various accounts [BA]	JT	\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Continental Resources, Inc. [OT]	SP	\$15,001 - \$50,000	Royalty	\$5,001 - \$15,000	<input type="checkbox"/>
DESCRIPTION: Royalty payment for small mining claim in North Dakota.					
Home lot: 2909 Hidden Valley Dr. [RP]	JT	\$15,001 - \$50,000	None		<input type="checkbox"/>
LOCATION: Lake Havasu City, AZ, US					
iShares by Blackrock Core S&P 500 IVV [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares by Blackrock Core S&P 500 IVV [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
MSW Communications, LLC [RP]	JT	\$500,001 - \$1,000,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Hood River, OR, US					
Personal IRA ⇒ Cascade Central Credit Union [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Personal IRA ⇒ iShares by Blackrock Core S&P IVV [EF]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Personal IRA ⇒ iShares by Blackrock Core S&P Small Cap [EF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Personal IRA ⇒ Vanguard Target Retirement 2020 Investor CL [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Personal Trust ⇒ Cascade Central Credit Union money market [BA]		\$100,001 - \$250,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Personal Trust ⇒ Edward Jones CASH Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Portland OR Sewer Bond called and proceeds went into this account					
Personal Trust ⇒ Fidelity tax-free money market [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Personal Trust ⇒ Portland, OR Sewer System First Lien Series A Refunding Revenue Bond [GS]		None	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Bond Matured					
Personal Trust ⇒ Willamette Valley Vineyards, Inc. - Series A Redeemable Preferred Stock (WVVIP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Spousal IRA ⇒ Cascade Central Credit Union [IH]		\$1,001 - \$15,000	Tax-Deferred	None	<input type="checkbox"/>
Spousal IRA ⇒ Fidelity Core FDIC Insured Deposit Sweep [BA]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
Spousal IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
iShares by Blackrock Core S&P 500 IVV [EF]					
Spousal IRA ⇒ iShares by Blackrock Core S&P Small Cap [EF]		\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>
Spousal IRA ⇒ Vanguard Target Retirement 2025 Investor CL [MF]		\$15,001 - \$50,000	Tax-Deferred		<input checked="" type="checkbox"/>
Spousal Trust ⇒ Cascade Central Credit Union money market [BA]		\$50,001 - \$100,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Spousal Trust ⇒ Edward Jones CASH Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input checked="" type="checkbox"/>
DESCRIPTION: Portland OR Sewer Bond Called and proceeds went into this account					
Spousal Trust ⇒ Fidelity tax-free money market [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	<input type="checkbox"/>
Spousal Trust ⇒ Portland, OR Sewer System First Lien Series A Refunding Revenue Bond [GS]		None	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
DESCRIPTION: Bond Matured					
Spousal Trust ⇒ Willamette Valley Vineyards, Inc. - Series A Redeemable Preferred Stock (WVVIP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
State of Oregon PERS [DB]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Tower Property [RP]	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
LOCATION: Hood River, OR, US					
Vanguard REIT Index Admiral CL [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Target Retirement 2020 Investor CL [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Target Retirement 2025 Investor CL [MF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Vanguard Target Retirement 2030 Investor CL [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Wells Fargo checking account [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Personal IRA ⇒ Vanguard Target Retirement 2020 Investor CL [MF]		01/29/2018	P	\$1,001 - \$15,000	
Personal IRA ⇒ Vanguard Target Retirement 2020 Investor CL [MF]		03/19/2018	P	\$1,001 - \$15,000	
Personal IRA ⇒ Vanguard Target Retirement 2020 Investor CL [MF]		03/12/2018	P	\$1,001 - \$15,000	
Personal Trust ⇒ Portland OR Sewer System Bond [GS]  DESCRIPTION: The bond holder exercised call option		06/15/2018	S	\$1,001 - \$15,000	<input type="checkbox"/>
Spousal IRA ⇒ Vanguard Target Retirement 2025 Investor CL [MF]		01/17/2018	P	\$1,001 - \$15,000	
Spousal IRA ⇒ Vanguard Target Retirement 2025 Investor CL [MF]		01/29/2018	P	\$1,001 - \$15,000	
Spousal IRA ⇒ Vanguard Target Retirement 2025 Investor CL [MF]		02/6/2018	P	\$1,001 - \$15,000	
Spousal Trust ⇒ Portland OR Sewer System Bond [GS]  DESCRIPTION: The Bond holder exercised call option		06/15/2018	S	\$1,001 - \$15,000	<input type="checkbox"/>

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Columbia Gorge Broadcasters	spouse salary	N/A

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
President	Columbia Gorge Broadcasters
Member	MSW Communications, LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
August 1989	self and State of Oregon	State of Oregon retirement plan for service in Oregon Legislature. No further contributions made by self of State of Oregon.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
The Ripon Society and Franklin Center	11/7/2018	11/13/2018	District - Paris, France - Washington, DC	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>Personal IRA</li><li>Personal Trust</li><li>Spousal IRA</li><li>Spousal Trust</li></ul>
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EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☒ Yes ☐ No

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## **CERTIFICATION AND SIGNATURE**

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Hon. Greg Walden , 05/15/2019